Virginia Cooperative Extension
Virginia Tech • Virginia State University

Extension Contacts Reporting Fact Sheet

Purpose of Extension Contacts Reporting

Virginia Cooperative Extension (VCE) recognizes the importance of diversity and inclusion in the development and implementation of Extension programs. However, beyond our own interests in program inclusion, as a federally funded agency, VCE is required to comply with USDA Civil Rights nondiscrimination policies, rules, and regulations. Specifically, VCE must establish and maintain a system for collecting and reporting data on clientele participation in Extension programs. This data system must obtain racial, ethnic, and gender data on all significant aspects of program participation. The contacts data are also supplied to the state government to illustrate the extent to which we reach Virginians with our educational programs.

Direct and Indirect Contacts

VCE collects both direct and indirect educational contacts. Both types of contacts are reported by one of the Critical Issues and by date. This enables us to summarize data by program and by calendar and fiscal year.

A *Direct Contact* refers to the face-to-face interaction with clientele where there is an exchange of educational information. Direct contacts occur in office, field, or home consultations, conferences, workshops, seminars, meetings, and similar activities in which the educational mission of Virginia Cooperative Extension is carried out. Programs delivered through videoconferencing (Zoom, Microsoft Teams, etc.) that include two-way interaction between the presenter(s) and audience may be reported as direct contacts.

Direct Contacts are reported **by gender** (female, male, or other/unidentified) and the following designations of *ethnicity and race*:

- **Hispanic or Latino Ethnicity**. A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

- **American Indian or Alaskan Native**. A person having origins in any of the original peoples of North America, South America, or Central America and who maintains cultural identification through tribal affiliation or community recognition.

- **Asian.** A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

- **Black or African American**. A person having origins in any of the black racial groups of Africa.

- **Native Hawaiian or Other Pacific Islander**. A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

- **White**. A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

Federal guidelines for the collection of gender, ethnicity, and race data only allow for program participant self-reporting. The VCE Program Participant Self-Reporting Form, Publication 490-850, can be used to collect this data. Youth (<18) gender, ethnicity, and race data may only be reported by a parent or legal guardian.

An *Indirect Contact* refers to several other means besides face-to-face contacts by which an Extension staff member engages a client in Extension programming. Those indirect means include:

- *Contacts by E-mail* – Report the total number of e-mail contacts made in response to requests for information in support of a Critical Issue.

- *Contacts by Newsletters* – Report the total number of newsletters distributed in support of a Critical Issue. (The number of issues multiplied by the number of people sent the newsletter.)

- *Contacts by Telephone* – Report the total number of telephone calls handled in response to requests for information in support of a Critical Issue.

- *Contacts by Non-electronic Correspondence (Other)* – Report the total number of non-electronic correspondences mailed in support of the Educational Program.

- Contacts through social media (Facebook, Twitter, Pinterest, etc.) should be counted as indirect contacts. If age group information cannot be determined, then list these contacts as "unknown age".

- Contacts through electronic delivery (Youtube, Zoom, Microsoft Teams, etc.) of a program, without live interaction, such as recorded presentations, should be counted as indirect contacts. If age group information cannot be determined, then list these contacts as "unknown age".

Like direct contacts, indirect contacts are also reported by age. The categories for reporting age are youth (<18), adult (18 and over), and unknown age. Since indirect contacts are not face-to-face, if the individual is not known, it will be difficult to know the age category of the contact. However, for known individuals on phone calls, email notes, and newsletter lists, the age category may be known. If it is not, designate the indirect contact age as "unknown".

Distinguishing Between Educational Contacts and "Business-Related" Contacts

It is important to be able to distinguish between contacts of an educational nature and those of a "business" nature. VCE is only interested in collecting educational contacts. An educational contact with a client should reflect the VCE Mission: *Virginia Cooperative Extension helps lead the engagement mission of Virginia Tech and Virginia State University, the commonwealth's land-grant universities. Building local relationships and collaborative partnerships, we help people put scientific knowledge to work through learning experiences that improve economic, environmental, and social well-being.* Ask these questions if you are not sure:

- Does your contact with the client use an educational process (i.e. consultation, presentation, publication, etc.)?

- Does your contact with the client use scientific knowledge (i.e. the scientific knowledge of a staff

member, a publication or a website)?

Contacts that are of an extension "business" nature should not be counted. Examples of "business-related" contacts include: responses to inquiries about the time and place of events, even if the event is an educational program; client referrals to another office or program; confirmation of a registration for a program; or a request for a consultation. If your contact with the client does not use an educational process and scientific knowledge, it should probably not be counted as a contact.

Who Is Required to Collect and Report Contacts?

All people employed with Virginia Cooperative Extension by Virginia Tech and Virginia State University and those who volunteer for VCE, who have contact with clientele for the purpose of educational delivery, are required to *collect* clientele contact data. Table 1 (see page 3). lists groups of staff members who must *collect* contacts and how those groups are to *report* their contacts.

Contacts reporting is conducted through the CONTACTS reporting system found on the VCE Intranet (*https://sites. google.com/view/extintranet/reports-and-plans/reporting*). In order for employees to report contacts, they must have an active Virginia Tech PID (a computer user id and password).

Contacts Reporting Policies and Guidelines

- Direct and Indirect Contacts must be reported by Critical Issue and Date at least monthly. The CONTACTS reporting system on the VCE Intranet is used to report contacts.

- More than one contact with the same individual during a single day can occur if the individual participates in different Critical Issues. Report these contacts under the appropriate Critical Issues.

- If more than one faculty member addresses an audience during an educational program, each faculty member reports the entire audience as face-to-face contacts.

- More than one activity can sometimes be combined into a single contacts record. For example, you may combine all of your farm visits or 4-H club meetings into one monthly summary record if all pertain to the same Critical Issue.

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Table 1. Contact Reporting

Staff Who Must *Collect* Contact Data	How Staff Members *Report* Contact Data
All Extension faculty (agents, specialists, research associates and administrators, etc.)	Must personally report contact data
4-H Center Directors and Program Directors	Must personally report contact data
Program Associates	Must personally report contact data
Program Assistants	Must personally report contact data
Program Technicians	Must personally report contact data
Project Associates	Must personally report contact data
Administrative Assistants at all levels	Must provide contact data to supervisor
SCNEP and EFNEP Program Assistants	Will provide contact data to their District Program Coordinator
Salaried county/city employees supervised by Cooperative Extension	Will personally report or will submit contact data to supervisor (depends on position)
Volunteers in all program areas	Must provide contact data to the VCE staff member for whom they are volunteering

- Face-to-face educational programming contacts between Extension staff members and volunteers is reported in the Direct Contacts section.

- Contacts related to Extension business (non-educational in nature) between Extension staff members and between Extension staff members and volunteers; i.e., internal contacts, should not be reported.

- Contacts related to Extension educational programming between Extension staff members (Specialist to Agent, Agent to Agent, Agent to Program Assistant, etc.) such as in-service training, should not be reported.

- Many contacts are made by Extension Administrative Assistants and other support staff members and volunteers with clientele who call or visit the Extension Office. Records of these contacts will be kept by the support staff members and volunteers with a notation to help the faculty member place the contact within the appropriate Critical Issue. These records will be given to the appropriate Extension faculty member who should report these contacts under the applicable Critical Issue. If the contact was face-to-face, the data should be recorded and reported as a Direct Contact. If the contact was by a means other than face-to-face, then the contact should be recorded and reported in the appropriate Indirect Contact category. Record of Contact, VCE Publication 490-157, is available for support staff and volunteers to use in office environments for the purpose of collecting direct and indirect contact information.

- All VCE volunteers who conduct educational programs should be trained and are expected to record clientele contacts. These records will be shared with the appropriate faculty member for reporting purposes.

- You are not required to use any of the VCE forms to record contacts, but you must have some method of documenting your contacts that conforms to the VCE format and policies. You can design your own form or use an Excel spreadsheet to record contact data.

- All paper records of contacts data must be retained for a period of three years from the date of record. This includes hard copies or their equivalents.

- Educational materials delivered by mass media methods (websites, TV, radio, and newspaper articles) should NOT be counted as contacts. It is often difficult to determine how many people actually read content on a website, hear a radio program, or read a newspaper article you prepare. Consequently, contacts made through media are not considered contacts for the purpose of the VCE Contacts Reporting system because the individuals with whom information was exchanged cannot be effectively identified or quantified.

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Contacts Reporting FAQ's

How often should I report Extension Contacts?

It is recommended that clientele contacts be recorded on a monthly basis. Some faculty members find that recording contacts more often results in less confusion and reduces chances of losing data. The CONTACTS reporting system allows users to enter data as often as needed.

How do I maintain an accurate count of my Extension contacts?

The recommended procedure for maintaining accurate clientele contacts is to put into place a system that works for you so you can collect data in all the settings in which you work. Most faculty/staff members use a log to record contacts while in the office or while out visiting clientele. You should also become familiar and confident with the tools available to collect demographic data in group settings. Set aside time in your calendar on a regular basis (at least monthly) to record the data you have collected.

Direct Contacts are defined as face-to-face interactions with clientele where there is an exchange of educational information. Please give some examples of what is included and what is not.

Educational information may be provided in a face-to-face conversation or a presentation where a recommendation is given or an explanation of educational subject matter is provided. If an Administrative Assistant provides a publication or other written material to a client who walks into the office, this is a direct contact. A volunteer conducting an educational workshop should count the audience as direct contacts. However, if the face-to-face contact only pertains to the dates of the fall feeder-calf sales, the place of the "Quantity Cooks" workshop, or to sign up a child for 4-H camp, then the contact is not educational, but more "business" in nature. Business-related Extension contacts should not be counted.

An indirect contact is defined as engaging clientele in educational programming through e-mail, phone, and other means. Can you give some specific examples of what is and what is not included as an indirect contact?

If the contact is via a phone call, an e-mail, or a letter and educational information is shared, then this would be considered an indirect contact. Examples of indirect contacts include: Administrative Assistant sends a VCE publication to address a question that was posed by a client on the phone; a faculty member responds by e-mail to an e-mail request from a client for a recommendation on what pesticide to use to control a weed; an agent sends out an educational newsletter to a mailing list. Sending out flyers about an upcoming meeting, responding to a phone call about 4-H camp counselor job openings, or submitting an article to the local newspaper are not valid indirect contacts. These are examples of "business-related" contacts.

How should I report contacts when the subject matter I am teaching crosses two or more Critical Issues?

Make a judgment call and record the contacts in one Critical Issue or split the contacts among multiple Critical Issues.

We conduct 4-H enrichment programs once a month in every 4th grade classroom in our county. How do I count these contacts?

First of all, since the contacts are "direct," demographic data is required. It is suggested that you create a roster of all of the students in each classroom that includes the required demographic data. Each month you would use the roster for each classroom to record attendance at the 4th grade 4-H program. As long as all of the classroom programs fit the same Critical Issue, you could tally the numbers and report the aggregate figures for the month.

Our Extension office offers an agriculture awareness program every year to the local elementary schools. It is an outside event that involves over a thousand youth. How should I collect contacts data?

If there is no practical means to collect data on each individual youth, then you can rely on information that can be provided by the school system. The school has data on the cumulative demographic make up of its student body that they should be willing to share with you. While these numbers may not be 100 percent accurate (due to absences for example), under most circumstances this would be a very acceptable means of collecting contacts data for this event.

How is contacts data used?

This contacts data is useful in providing information about clientele participation in VCE programs to federal, state and local partners, and other stakeholders. Perhaps most importantly, contact information on race and gender is used to meet state and federal laws on affirmative action.